

# Engagement Survey Training

## *Module #3: Improvement Planning*

# This module was built *for...*

- ✓ All formal and informal leaders who will facilitate action planning



# Our Agenda



## What we'll cover

- What is improvement planning and why do we do it
- The process of improvement planning
- The dos and don'ts
- Understanding your team's readiness to improvement plan- Leader Index review
- Template for sharing results with your team
- Tips for action planning safely
- Template for documenting your improvement planning
- Example of a good plan

# Improvement Planning

## Definition

Improvement planning is the act of sharing engagement data with our teams, selecting areas of focus, and together devising a plan to make things better.

## Benefits

1. **Build trust** by sharing results transparently with your team
2. **Celebrate** what we do well as a team and where we need to focus
3. **Listen** to our team members and understand their experiences
4. **Empower** team members to create and implement solutions
5. **Opportunity for our leaders to evolve** and grow based on feedback from their team

## Recommendations

We believe all teams would benefit from the opportunity to review their results and collaborate with their leaders to create a plan for improving their work experience. However, this process is particularly important, and **highly recommended for low Team Index 2 and 3 scoring teams.**

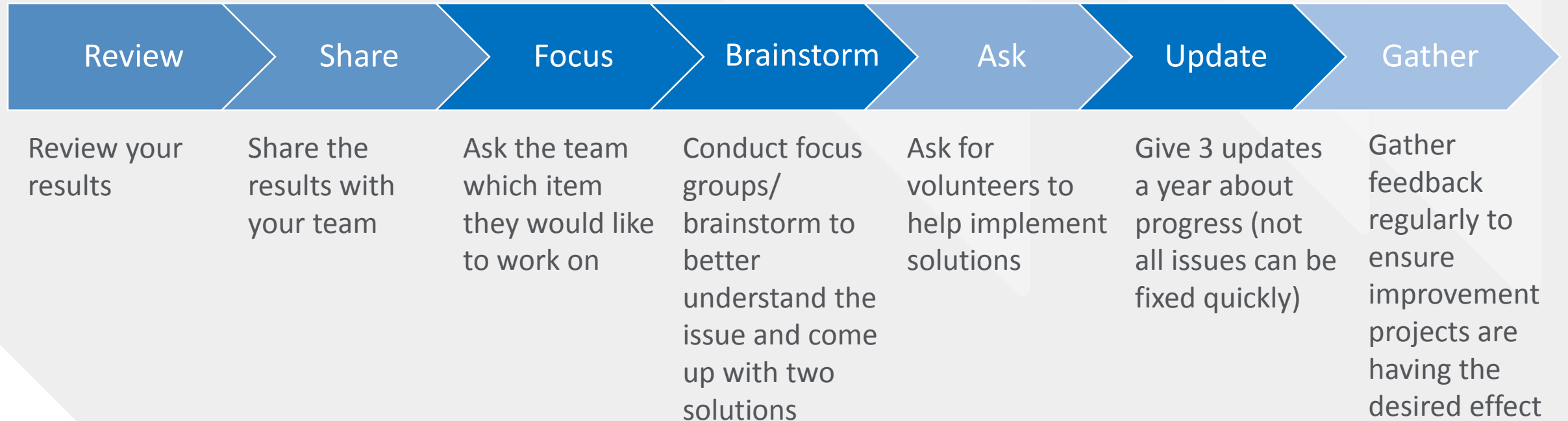
# Improvement Planning

*Its easy as 1, 2, 3!*

Identify **1** critical area to address

Identify **2** ways to improve critical area

Share progress with team **3** times a year



# The Do's and Don'ts

## Do

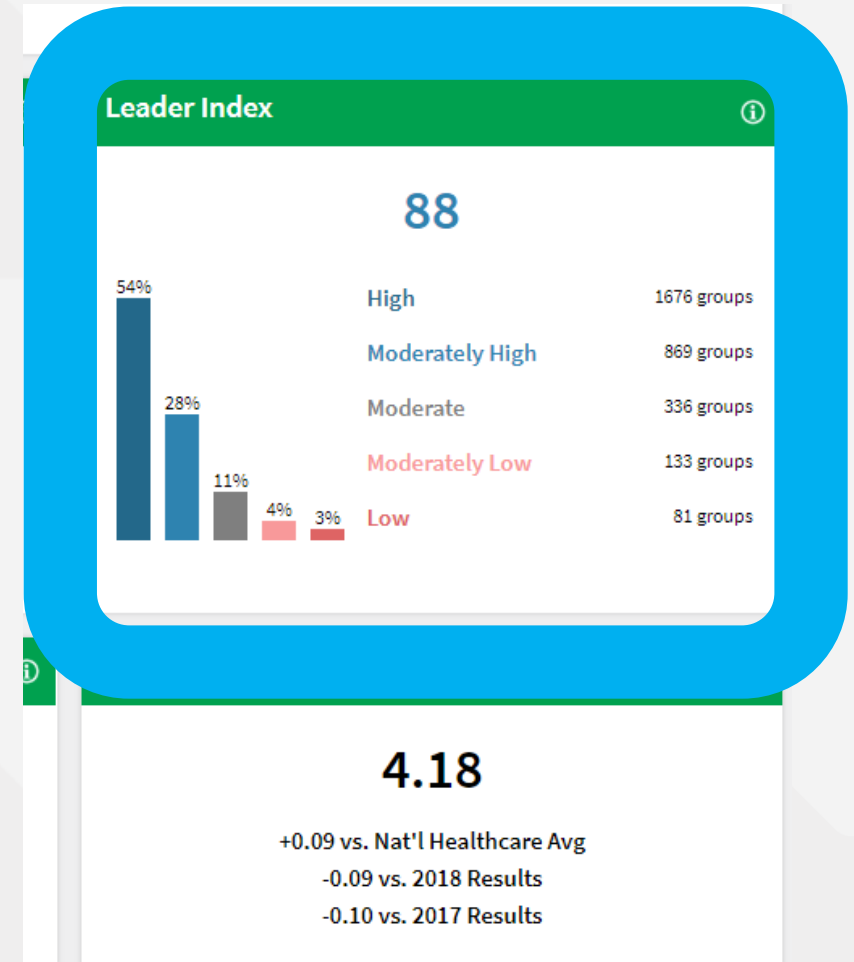
- ✓ Engage your survey ambassador in reviewing and sharing your team's results
- ✓ Share comment themes and key drivers for your work unit/practice/area
- ✓ Check out your leader index score, if low, engage your HRBP for assistance
- ✓ Leverage technology to ensure all team members have the chance to contribute

## Don't

- ✗ Create the plan by yourself
- ✗ Get caught up trying to figure out who wrote which comments, don't read or share individual comments, it might make a team member feel uncomfortable
- ✗ Become discouraged by constructive criticism, your HRBP can support you in understanding your team's perceptions
- ✗ Let a vocal few overshadow the voice of others

# Improvement Planning *Readiness*

- ✓ Leader index is made up of 4 items:
  1. The person I report to treats me with respect.
  2. I respect the abilities of the person to whom I report.
  3. The person I report to is a good communicator.
  4. I am involved in decisions that affect my work.
- ✓ If the leader index score is **below 70**, be sure to contact your HRBP before approaching improvement planning with your team
- ✓ This can be an emotional process for leaders, try to remember that feedback is an opportunity for you to evolve your leadership style, perceptions can be changed with time and effort




# Sharing results with your Team

- **Use this template** to share results with your team
- Be sure to share this information with your **survey ambassador**, ideally you would co-present this information to the larger team
- Make **next steps** clear
- **Enlist volunteers** to help
- Be sure to remind your team of all of the **great work** that is **already happening** to improve their experience at a system, entity and department level. Here are some examples:
  - ✓ Performance evaluations tied to merit increases
  - ✓ Career conversations for how to GROW with Northwell
  - ✓ New careers portal for greater opportunity awareness and internal mobility

## Workforce Engagement Survey

Results Communication Tool

Use this Guide to populate your 2019 Employee Engagement Results so you can share it with your team



Use this content to share the Northwell Health Engagement Results.


### Our Entity's Results

Enter your entity's logo


Use this content to share entity level results (your hospital, service line, division etc. This should be populated by HR Business Partners).  
"HRBPs should partner with their Executive team to craft a summary statement that represents their results."

### Our Team's Results

<b>Participation Rate</b>  This is the percentage of our team members that participated in the survey	<b>Trust in the Survey</b>  This is the percent of team members who gave a positive rating on the question "Info from this survey will be used to make improvements"	<b>Leader Index</b>  <ul style="list-style-type: none"><li>• Treats me with respect</li><li>• Respect leader's abilities</li><li>• Leader is good communicator</li><li>• I'm involved in decisions</li></ul>	<b>Team Index</b>  Our team's Tier (1, 2, or 3) 1 is the highest performing based on 14 "power items" which are questions about teamwork, respect and communication from leaders, recognition, work-life balance and organization's ethics.
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**Strengths/High Performing Items**

Item 1	% Favorable
Item 2	% Favorable
Item 3	% Favorable

**Concerns/Lowest Performing Items**


Item 1	% Favorable
Item 2	% Favorable
Item 3	% Favorable


### Our Action's From Last Survey

Enter highlights from previous engagement action plan

### Our Next Steps

Enter next steps



Made for this



# Tips for Improvement Planning *Safely*

In-person group gatherings are not recommended at this time. Fortunately, we can leverage several platforms/tools to share results, gain input, and co-create our solutions safely.



Microsoft Teams meetings, leverage chat function to gather input quickly



Poll Everywhere\* create word clouds, structure voting options (multiple choice) or free text contributions



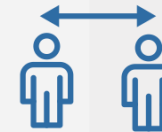
Survey Monkey\* gather feedback across shifts and locations, can be accessed on-demand, every person can vote/contribute equally



Idea Board results can be posted in breakrooms or common areas for individual contributions (can be physical or virtual)



SharePoint\* Ideal for hybrid/remote teams on various shifts, collaborate on an idea on a shared document, integrated edits/contributions



Rounding on individual team members  
Masked, socially distanced one on one conversations with team members is ideal in areas where roles are not computer based

Note: Please don't hesitate to reach out to your HRBP for support if using this technology for the first time. Free versions may have participation limits. Also, PHI should never be used.

# Improvement Planning Readiness

- Use **this template** to create your improvement plan with your team
- Be sure your **survey ambassador is consulted**
- Make sure you have a plan for how to **measure your progress** and success
- Ensure **task ownership is clear**
- **Print a copy** and hang in your unit/practice/department, for office based roles **be sure everyone received a copy** via email or Microsoft teams

*This isn't about compliance or checking the box,  
its about creating a great place to work for all*

## 2019 Workforce Engagement Survey Improvement Planning Template

Use this template to create item specific improvement plans with your team.

The goal is a description of the optimal state. What does success look like?

What factors contribute to dissatisfaction related to this survey item?

Besides an improved score on future engagement surveys, how else will we measure our progress?

As progress is made, you can use this field to populate updates in the Press Ganey improvement portal.

List the different tasks/steps you and your team need to complete to execute your plan. Be sure to add names and dates to keep everyone organized and on track.

Feel free to add additional content in this space.

Choose the question your team wants to improve:

Enter the title of your team's improvement plan:

Define Goal:

Define Issue:

Define Success Measure:

Progress Updates:

Define Task:

Add a Comment:

Share this Plan:

Save all Changes

Save and Send Read Link

Save and Send Read Link

Once you complete your plan with your team, you can enter it into the Press Ganey Improvement Portal. Once entered into the portal, you can share this plan with others.

PRESS GANEY

Northwell Health

Made for this

# Sample Improvement Plan

Item	28. I am satisfied with the recognition I receive for doing a good job.
Goal	Success is defined as moving the percentage (52% favorable) to at least 70% favorable on the next Press Ganey Survey
Issue	Team would like to be recognized by various levels of hospital staff. Team expresses that they are often "ignored" during treatment sessions. Medical staff will walk in and interrupt session as if they were not there. Team would like more interdepartmental recognition as well as administrative rounding/recognition
Success Measure	This will be a monthly agenda item at Department meetings (monthly rounding) and will be openly discussed with the team the plan that was implemented, progress on the plan and ask for feedback and/or new ideas.
Progress Update	Progress To Date- Interpreted Team results- Discussed results with the Team (1/14/2020), received feedback from the team and now implemented that plan.
Tasks	1. 1- Shout out during Daily Line Up 2- Thank you cards send monthly on a consistent basis by VP or Director for each discipline. 3- In the coming months, discuss with Hospital Medicine the recognition of the Rehab staff when entering a room while treating.
Comments	1. Others Tasks being worked on: Career Ladder, Morale Boosters

## Why is this an effective action plan?

- ✓ Specific issue regarding recognition was identified based on conversation with the team
- ✓ Specific, quantitative goal/success measure
- ✓ Plan progress updates will be provided during monthly department meetings and team members will be asked for feedback/new ideas
- ✓ Progress updates logged
- ✓ Specific tasks with timeframes and defined roles

Thanks for the great example Mather!



# *We are here to support you!*



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*Together...*

**We're made for** *this*